# EBAC- Appendix
# Selecting a Badass Agile Coach

*Selecting a professional Badass Agile Coach, or any coach for that matter, is a powerful first step in your journey to learning, growth, and success. Many don't take that step because it implies vulnerability and the need for help. But it's really not about the coach. It's about you.*

*I have a friend who talks about coaches taking their clients on a Hero's Journey, never making it about the coach, always making it all about the clients—their learning, their growth, their epiphanies, their decisions, and their journey.*

*Still, it's critically important to find the right coach for you. One who partners with you in your Hero's Journey. Someone with whom you feel safe, respected, and trusted.*

## Introduction

Since most digital/agile transformations require a seasoned guiding hand to help you accelerate your adoption, this is one of the more important decisions you'll make as a client.

Following are some considerations when choosing your Extraordinarily Badass Agile Coaches.

## Reflect First

Consider why you're looking for a coach. What challenges are you facing? What sorts of skills do you expect them to bring? If you're just starting up, your initial goal will be finding a coach that has experience jump-starting agile teams. If you've been doing agile for a while and are looking for a tune-up or an assessment, then that may take you in another direction. Most coaches can handle both ends of that spectrum, but it's useful to be clear about your spot on the agile adoption curve.

Realize that there's a special relationship that forms between the agile coach and the organizations they're coaching. You must be prepared to establish a partnership with your coach. Be ready to share dirty laundry and personal challenges. Be ready to trust the coaches you select—not only their experience, but their character and integrity.

Be open to learning from them, but open to challenging them to raise the bar in your agile adoption efforts.

## Work Experience

It's normal for agile coaches to either focus on the organizational/team coaching (nontechnical) areas or on the technical skills coaching areas. Technical coaches usually focus on tooling and technical practices; for example, continuous integration or deployment (CI/CD), test-driven development (TDD), and refactoring and patterns. For these coaches, you're looking for work experience that aligns with your technology stack and domain dynamics. Often, architects or very senior developers transition into this style of coaching.

You'll also want to see some public speaking and teaching in their backgrounds, to ensure they can

effectively teach their skills in pairs and small groups. Quite often the interview or selection of these coaches is more of an audition, where they come in and pair with team members in your organization. You'll assess technical coaching chops by they are *doing* rather than what they are *saying*.

For organizational coaches, you also want to consider the coaches personal work experience. What technical background and roles have they held? What sort of diversity is there in those roles? Have they held leadership roles in organizations?

I've found the best coaches have broad, deep, well-rounded work experience. For example, having held roles in architecture, analysis and design, development, and testing in a variety of software organizations can be a distinct advantage. Another advantage is having grown in enough in their careers to hold senior leadership roles (Director, VP, and/or C-level).

Knowing agile and lean is crucial, but knowledge of software development, testing, project management, and team leadership is also helpful for coaches. So, look for the breadth *and* depth.

## Coaching Experience

Is there a magic number of years of experience? Probably not. But I personally look for coaches with about 10 years of experience or more. I'm looking for in-the-trenches experience; for example, they've been an internal coach as part of agile transformations and have external consultative coaching experience. They've worked with small and large organizations and have encountered entrenched waterfall mindsets and entrepreneurial, open-minded start-ups. They've been around the block.

While domain experience is important, try not to get stuck too on coaches having a direct domain match. For example, I recently was approached to coach a business intelligence and analytics team, and the client was looking for direct business intelligence experience. From my perspective, I'm not sure that it matters so much, particularly if you're a deeply experienced coach. In fact, domain awareness can sometimes get in the way of your effectiveness by creating too much coaching bias.

## Methods

You may not know this, but there isn't a single, succinct agile methodology. Rather there is a *family* of methods that attempt to support and adhere to the Agile Manifesto and its corresponding values and principles. Some of the more popular method and framework factors include:

- **Methodologies** like Scrum, Extreme Programming, Kanban, Lean Software, AUP, DSDM, and Crystal. The more widely used are Scrum, XP, and Kanban.
- **Tactics** like Continuous Integration and Continuous Deployment, Test-Driven Development, Pairing, User Stories, Release Planning.
- **Frameworks for Scaling**, such as SAFe, DAD, Scrum-of-Scrums, LeSS, Nexus, PMO, Agile CoE, Agile CoP, etc.
- **Bodies of Knowledge (BOKs)** like PMI's *Project Management Body of Knowledge* (PMBOK), IIBA's *Business Analysis Body of Knowledge* (BABOK), work by Pragmatic Marketing and the Product Development and Management Association (PDMA), various AT*SQA Testing BOKs, etc.
- **Soft skills** like leadership coaching, facilitation, emotional intelligence, knowing the five dysfunctions, Open Space, understanding and applying personality type indicators, etc.
- **Tooling skills (if applicable).** Tools become particularly important in at-scale and distributed agile contexts. If tools are a focus, you should obviously look for matching experience.

The broader the experience your coach brings across these areas—real experience, mind you—the more flexible and sound their approaches will be as they tailor things to your context. Therefore, avoid coaches who have a one-size-fits-all approach to each of their agile engagements. Varied experience and context-based approaches will always be more valuable to you as you evolve your agile transformation efforts.

## Certifications

The Scrum Alliance Certified Enterprise/Team Coaching designations (CEC and CTC) are a potential differentiator for coaches. They help ensure the coach has demonstrated the skills necessary for each level. The CEC ensures the coach has moved beyond coaching individual teams and toward enterprise-level or organizational transformation coaching at scale. You gain some assurance their experience is broad, deep, and contextual. Beyond that, the bar for the CEC is arguably quite high, with about 75% of applicants not being accepted.

In addition to being evaluated for their knowledge and skills, CEC/CTC candidates are interviewed by CEC peers in a lengthy and rigorous process. As of this writing, there were approximately 500,000 CSMs in the Scrum Alliance, but only about 140 CECs in the world, about 60 of whom are in North America. Now, I think any certification has to complement real world experience, so don't just hire or engage because they have a CEC. But the credentials a coach brings to the table certainly matter, and should be a part of your decision-making process.

## Coaching Service Models

There seem to be two overarching coaching models in the agile world. Some clients want coaches to embed full time within their teams. Usually, these engagements are in larger organizations, so the coaches can influence more than one team at a time. These coaches typically get involved in organizational transformation as well.

The other model, and the one I subscribe to, is a more part-time coaching model. After some sort of kickoff event, this model is more tightly coupled to your sprint tempo, with the coaches engaging at the endpoints of each sprint. They help close the previous sprint and plan for the next. Sometimes they'll provide remote coaching between the endpoints, but it's essentially an iterative model that parallels your sprint and release tempos.

The key differences between these approaches are cost and organizational autonomy and growth.

The latter approach is typically less costly and enables the teams to more quickly stand on their own. The coach is there to guide, but the agile transformation effort is not only for the teams; it is for the entire organization. It's a "teach the organization to fish" model.

The former approach does align with most consulting contract experience and it is a simpler business model to orchestrate both for the client company and for the coaching firm. However, often the teams grow dependent on the coaches and struggle when they leave.

My experience is that the latter model places pressure on the teams and the organization to become self-directed and self-reliant, and to achieve higher performance more quickly. But both models can be effective.

## Balance

My friend and colleague Josh Anderson and I once explored the topic of not being a one-trick pony in one of our Meta-Casts. The point was for the coach (and leaders and other agilists) to not get stuck on one stance, posture, mindset, or approach.

This definitely applies to agile coaches. I often see coaches who are stuck in a single stance and not able to switch very well. It's particularly common to encounter coaches who are stuck in Coaching stance or in their Agile/Lean Practitioner competency area, and I see many who are weak in the Advisory and Facilitate Learning stances.

While you're not looking for a unicorn who is incredibly strong across all stances, you do want to look for a coach who has some depth and breadth balance.

## Purist vs. Pragmatist

For over 10 years, I've been categorizing agilists, myself included, as either purists or pragmatists. There's nothing wrong with either side, but it affects how they approach implementing and coaching the methods.

A purist often focuses on one method and doesn't take liberties in the implementation. For example, a purist Scrum coach would implement core Scrum as defined exactly in the Scrum Guide. There would be very little wiggle room in their implementation, and if you deviated from anything in the definition, you'd be confronted about not "being Agile."

In contrast, pragmatists are passionate and determined in their agile adoption guidance, but they apply situational flexibility and some common sense to their engagements. They consider where the client is coming from before they suggest next steps, so as to not set the bar unreachably high.

I consider myself a pragmatist, but know many purist coaches. The world needs both kinds, but you'll probably want to be selective to one side or the other. If you're selecting multiple coaches (or a team of coaches), mixing and matching at this level rarely produces good results.

## References

To check references or not to check references, that is the question. The answer is: please check! But be sensitive to the timing. You'll want to go through your due diligence and basic analysis first. Most coaches only want to engage their references (remember, they're customers like you) if the deal is reaching maturity and as a near-final step in the process. Also, avoid asking for too many references. One or two should suffice.

Once you get the references, you want to strike quickly. The coach has probably primed the references for your call, so avoid taking several weeks to follow through and surprising the references out of context.

## Wrapping Up Selection

When you're interviewing your coaches, please strive to create conversations instead of relying on simple Q&A interviewing. Not long ago, I went through a coaching interview. For 90 minutes, a panel of four interviewers peppered me with questions. Only at the very end did I get to ask my own questions, and they were cut off by the lack of time.

This isn't a good interviewing strategy in general and certainly not for an experienced coach. I strongly encourage you to ask situational, open-ended questions in an effort to share stories and get to learn about each other. In other words, simply have a conversation. I think you'll get more out it.

Here are some questions and considerations that may help when selecting your next agile coach. You may not want to run through all of these in every interview, but I hope they help your selection conversations:

- Explore what their typical coaching engagements look like. How do they enter an organization? How do they know it's time to exit?
- How much method breadth do they have within their coaching? Do they apply aspects of one method to others? Ask for an example or two of how.
- It's one thing to be well read. It's another to be well experienced. Explore the latter. Ask about their successes *and* their failures as a coach. What determines success or failure?
- Ask the coach if they've ever turned away clients. And if so, what are the general reasons for this decision? Here you're looking for indications of their selection criteria and "hot buttons" for agile coaching success.
- It's not easy to determine whether your candidate is a purist or a pragmatist. Questions on non-core Scrum activities, such as hardening sprints or sprint #0 or multitasking Scrum Masters will probably evoke discussions that will give you a clue as to where they stand.
- Ask your candidate where they spend the most time coaching: at the team level, management level, or leadership level? Does organizational maturity influence these percentages? Ask where they are the most comfortable.
- Try to ascertain the ego level of the coach. Ask how they handle it if one of their coached teams or organizations fails (or regresses)? Have they failed themselves? How do they retrospect on failures and successes? How do they adjust their coaching styles for different situations? Ask for a couple of examples.
- Ask them to rate themselves as coaches. Ask them to identify two coaches who are better than they are and explain why. Ask them to share who they've been mentored by most recently and what they have learned.

## Considering an Audition

So far, we've explored critical criteria for your agile coaches and a more traditional interview style for selection. But I would be remiss if I didn't at least suggest another approach for your evaluation: structuring your interview as a series of coaching sessions. Instead of questions or dialogue, ask your coaching candidate to show you how they coach in a series of one to three coaching scenarios. That way, they're not just telling you about or explaining their experience and skills, they're demonstrating them in real time.

This looks very much like the agile coaching dojos from chapter 17, but wrapped for an interview with specific individuals, teams, or groups being coached.

Depending on the scenarios you ask the interviewer to participate in and who you invite to participate, you can gain tremendous insights into the coach's situational awareness, ability to handle pressure, and ability to seamlessly change stances as appropriate.

## Tailoring Your Selection Process

This may seem like a lot of effort, but please don't let it stop you from pursuing a coach. I see so many agile teams that could use a solid coach, and I don't want the selection process to scare you away. Take whichever of these considerations make sense to you and leverage them in your search. I'd rather you simplify the criteria and steps and get the best coach possible than shy away entirely.

## Measuring the Impact of Agile Coaching

Measuring coaching effectiveness is a challenging topic to approach in this book. On the one hand, nearly every client I've ever encountered has asked me "How am I going to measure your effectiveness as a coach?" or "How do I measure your value or ROI as a coach to my organization?" And even after a decade or more of trying to explain things to them, I don't feel that I have a clear and precise answer. I certainly don't have a magical metric for them to measure.

But here's how I do answer.

### Partnership

The first thing I try to amplify is that we're in this together—the client or clients, their organization and teams, and the coaches. I view us as partners, and measuring me independent of their engagement is not something I'm interested in. Especially since we're inextricably linked.

For example, you could measure my coaching effectiveness by the amount of "stuff" that the team produces (velocity) and the increase of "stuff" sprint over sprint. However, my clients can influence this in a myriad of ways:

- Not prioritizing effectively and giving the teams low-value work
- Interrupting the teams and changing priorities, slowing things down
- Not helping to reduce/remove impediments which are impacting the teams
- Not coaching their teams
- Not being on board with the transition and the leadership mindset shift required to truly empower and engage the teams

And those are simply a few examples of our connection.

### Balanced Trending

There are no magic targets or singular metrics. Instead, I'd want to measure a set of cohesive, balanced improvement metrics, and we want to see how things are trending toward that improvement, over time.

I avoid fixed-time, fixed-target metrics: You need to achieve a 15% velocity improvement by the third sprint. Then a sprint-over-sprint velocity improvement of 5% per sprint. Across the 10 teams you are coaching.

Again, I'm not shy or unwilling to commit. But (1) this is something that we should partner on, and (2) these sorts of arbitrary targets aren't part of the agile mindset.

## Not Me, but You

The coaching relationship is a fuzzy one. If we're adopting a pure coaching model, then the coach really doesn't "do" anything. They're helping the client make their own decisions, continuously improve, and get all of the credit. It's never about the coach.

Given that, we want the coach abstracted from the measurement of the doing. Now, there can certainly be a correlation between the coaching activity and improved results trends. In fact, most organizations can quite easily see this. But the coaching relationship is not intended to have a traditional consultative view or a staff augmentation view.

## So, How Do We Measure Coaching Impact?

I know, I avoided the question. Let me try again.

- First, consider a balanced way of measuring the organizational system. My 4 Quadrants model is one example.
- Next, establish a performance baseline for the areas you're coaching.
- Later, incrementally observe and capture trends in those metrics over time.

If the coaching client and the coach are partnering effectively, there will be significant and balanced improvements across predictability, value delivered, quality, and employee engagement or team health over time, these improvements will be transparent and impactful. That is, the value proposition of the coaching should be self-evident from improvements in the system. If this isn't happening, then it might be a client problem, a coaching problem, or both. And one or more of these might need to be replaced.

The other focus point for measuring coaching effectiveness is polling those who are being coached to see how effectively they feel the coach is performing.

This combination of shared organizational impact and coaching client feedback is the best measure of your coach's coaching.

## Further Reading

- This post focuses on three critical attributes in your interviewing, the least of which is experience. Just food for thought: https://rgalen.com/agile-training-news/2016/4/18/the-3-as-of-agile-interviewing.

- This is an early article that introduced the 4 Quadrants of Healthy Agile Metrics: https://rgalen.com/agile-training-news/2012/6/2/the-agile-project-managerthe-essence-of-agile-metrics.html.

- Here's another article that speaks to indications of your agile transformation going well: https://rgalen.com/agile-training-news/2019/12/8/indications-of-agile-done-well.

- Jesse Fewell has written a nice article on the Scrum Alliance website that discusses how to measure effective agile coaching: https://resources.scrumalliance.org/Article/measure-effective-agile-coaching.

- Jason Yip provides an evaluation scorecard for agile coaches here: https://jchyip.medium.com/an-evaluation-scorecard-for-agile-coaches-51867fd3a99e.

- Gene Gendel shared his views on the top 10 objectives for agile coaches here: https://www.keystepstosuccess.com/top-10-objectives-of-agile-coach/.